

**GGI BEST PRACTICES &
DEVELOPING LEADERS CONFERENCE
20-22 SEPTEMBER 2018
QUÉBEC, QC, CANADA**



Hosted by:



Stein Monast
L.L.P. ATTORNEYS

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Dress Code: Smart Casual

We kindly thank our sponsors:



DRAFT DELEGATE PROGRAMME

****This is only a draft. GGI reserves the right to change the times and any part of the program at any time.***

Thursday, 20 September 2018

13:45 – 17:00	OPTIONAL: Québec Foodie Tour <i>Meeting Point: Hotel Lobby</i>
15:00 – 17:00	Auditing, Reporting & Compliance Practice Group Meeting Jeffrey A. Ford <i>This session will include:</i> <ol style="list-style-type: none"> 1. <i>Open discussion audit and practice management tools used by each firm</i> 2. <i>Discuss firms' approach to assessing and/or helping with client readiness for new revenue recognition guidance effective in 2019 for private companies</i> 3. <i>Discussing firm websites as a driver of audit opportunities</i> 4. <i>Update regarding GGI relationships with the AICPA</i>
17:00 – 18:00	“Swiss Values” (sponsored by Vontobel) Peter Little “Updates on Specialty Tax Services” (sponsored by Tri-Merit) Randy Crabtree <i>A look at recent changes to the R&D tax credit, and the 179D (Energy efficient commercial building deduction) as well as a review of the credit and deduction.</i>
18:00 – 19:30	GGI Hospitality Desk Open in the hotel
19:00 – 23:00	Welcome Reception & Welcome Dinner in the Hotel Presidential Welcome Claudio G. Cocca

Friday, 21 September 2018

08:45 – 17:00	GGI Hospitality Desk Open in the hotel
09:00 – 17:30	Conference in the hotel Best Practices & Developing Leaders Combined
09:00 – 09:05	Official Conference Opening Adam Crowson
09:05 – 09:15	Welcome by our Host Firm

09:15 – 10:00	<p>“Professional Persuasion: Powerful Techniques for Jonathan Fitzgarrald Getting Your Way More Often”</p> <p><i>Each of us is responsible for persuading others to action. Whether it’s a colleague, a prospect, a vendor or a client, the better we can identify the persuasion preference of our audience and customize our message to their preference, the more likely we will be at moving them to action. This presentation will address: an overview of the four persuasion types, triggers for quickly identifying one’s communication type, techniques for customizing your approach so others feel like you’re speaking their language and how to utilize the techniques to garner buy-in and approval on projects/initiatives.</i></p>
10:00 – 10:45	<p>“The Biggest Bang for Your Buck” Anthony J. Soukenik</p>
10:45 – 11:15	Coffee Break
11:15 – 12:00	<p>“People are Watching! How your Reputation Affects your Success” Jonathan Fitzgarrald</p> <p><i>Within one quarter of one second, you have been sized-up! Your ability to be effective in your role, compelling with key audiences, and sought after as a “trusted advisor” largely depends on the image you portray and how others perceive you. Are you properly managing your personal brand or allowing others to make-up their own preconceived notions about you and your ability to perform? Through real-life scenarios and high-profile examples, learn how to position yourself as the “go to” authority within your industry, leverage your distinguishing characteristics, and create a lasting impression that will give you entry into new circles of business.</i></p>
12:00 – 13:30	Lunch
	<p>Best Practices & Developing Leaders split into separate groups</p> <p>Best Practices</p>
13:30 – 14:30	<p>“The Aging of Professionals and What can be Done to Stop It” Edward C. Winslow, III, Harvey Sorenson & Brian Smith</p>
14:30 – 15:00	<p>“Evolution to Revolution” Danielle Robitaille</p> <p><i>How artificial intelligence will affect bankers, lawyers and accountants.</i></p> <p><i>We’re at the beginning of the 4th industrial revolution, and artificial intelligence represents significant change for many industries, including and quite predominantly the financial sector. Antiquated techniques for achieving assurance are being surpassed by more effective and efficient, less costly methods while the legal and regulatory community seek to catch up. What are these emerging methods, how are they being used today and how can we educate and prepare ourselves to embrace this evolution and reap its proposed benefits.</i></p>
15:00 – 15:30	Coffee Break

15:30 – 16:00 Benchmarking Review Theodore P. Offit & Michael Malloy

16:00 – 17:15 Legal and Accounting Benchmarking Breakouts

Developing Leaders

Participants should be changed into casual/gym gear.

13:30 – 14:30 “Becoming a Professional Fixture in Your Community” Rebecca W. Watson

14:30 – 18:00 Team-Building Exercise
Meeting Point: Hotel Lobby for transfer.

Best Practices & Developing Leaders Combined

19:00 – 23:00 BBQ Dinner at Cercle de la Garnison de Québec
97, rue Saint-Louis, Québec City, G1R 3Z6
Dress Code: Smart Casual
Meeting Point: Hotel Lobby for transfer

Saturday, 22 September 2018

08:45 – 12:00	GGI Hospitality Desk Open in the hotel
09:00 – 12:00	Conference in the hotel
	Best Practices & Developing Leaders Combined
09:00 – 09:45	“Staff Retention Techniques” Bill Purk & Rebecca Watson
09:45 – 10:30	“Contented Cows Give Better Milk ... Your People Your Profit” Richard Hadden
	<i>In today’s tight and competitive labor market, creating a focused, engaged, and capably led workforce is one of the best things any business – large or small – can do for its bottom line. Richard Hadden, co-author of “Contented Cows Still Give Better Milk: The Plain Truth about Employee Engagement and Your Bottom Line”, helps you make the people-profit connection by answering three questions about Employee Engagement: What is it? Why do I want it? How do I get it? Come and learn how to attract and retain an engaged – and more profitable – workforce, in this practical, content-packed, and entertaining presentation.</i>
10:30 – 11:00	Coffee Break
11:00 – 12:00	“Evolution of a Firm” Reid Phillips, Timothy Lynch & Nick Nicholson
	End of Conference
14:00 – 17:00	OPTIONAL: Québec City Tour <i>Meeting Point: Hotel Lobby</i>

GUEST SPEAKERS

Jonathan Fitzgarrald

Jonathan Fitzgarrald is Managing Partner of Equinox Strategy Partners, providing service professionals and firms with strategic counsel to drive revenue and increase market visibility. For nearly two decades and prior to founding Equinox Strategy Partners, Jonathan directed the sales and marketing at three, top business law firms.

Prior to his focus in professional services, Jonathan held senior-level sales and marketing positions at various public and private companies within the high-tech, telecommunications, electronics, healthcare, and consumer products industries.

A clear, dynamic, and diplomatic communicator, Jonathan regularly speaks and presents to professional audiences on various business development and marketing topics. He has been quoted in such publications as The Wall Street Journal, Los Angeles Times, the National Law Journal, The Recorder, ABA Journal, Strategies: The Journal of Legal Marketing, City News Service and on The CBS Evening News with Katie Couric, KNBC.com and Law.com.



Richard Hadden



Richard Hadden is an author and workplace expert with a focus on Leadership and Employee Engagement. He is co-author of the popular “Contented Cows” leadership book series, and the book Rebooting Leadership. His latest book is Contented Cows STILL Give Better Milk.

A former Information Technology Manager and college instructor, Richard has, since 1990, spoken and conducted leadership training for more than 850 audiences on five continents.

He has appeared on CNN and MSNBC, and his work has been featured in The Wall Street Journal, Business Week, and Inc. Magazine.

OPTIONAL EXCURSIONS

Thursday, 20 September 2018, 13:45 – 17:00

QUÉBEC FOODIE TOUR

Throughout the years, Québec's food has been influenced by Amerindian, British and French cuisines. This tour offers you the opportunity to discover these different culinary and cultural traditions and taste products that have made the gourmet authenticity of Québec City.

On this walking tour, your guide will highlight some of the history, architecture and important facts between stops for some of the most typical and truly local specialities. You'll enjoy tastings of local products from a variety of shops, neighbourhood grocers, restaurants, bakeries, chocolatiers and more.

Wear comfortable shoes for walking.

CAD 145.- per person

Saturday, 22 September 2018, 14:00 – 17:00

QUÉBEC CITY TOUR

Founded in 1608 by Samuel de Champlain, Québec City is a UNESCO world heritage site and the only fortified city in North America! With its European charm, it is a nest box of treasures at every corner and an epicentre of Canadian history.

Some of the highlights of this tour include: The Fortification (4.6km long surrounding the old city), the Plains of Abraham (site of the 1759 French-English battle), Parliament (with its French- and English-influenced architecture), the Citadel (built to protect the city against an American invasion), Grand Allée (the largest concentration of sidewalk cafes in the area), Notre-Dame-de-Québec Basilica (located in the oldest registered parish in North America), and Place Royal (the site of the founding of Québec City).

Wear comfortable shoes for walking.

CAD 145.- per person.